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ABSTRACT

This handbook provides FY (fiscal year) 2000 guidelines developed by the Library of Michigan for applying for LSTA (Library Services and Technology Act) subgrant funding. The handbook includes the following sections: (1) overview of the LSTA subgrant program; (2) general application guidelines for all funding areas; (3) required elements of the grant application, including funding area, project administration, abstract, narrative, project objective(s), project activities, objective budget, summary budget, timeline, evaluation, participating agencies and service populations, and board resolution statement of assurances; (4) budget category definitions for communications, library materials and supplies, professional services and costs, promotion and outreach, technology, training, and miscellaneous; (5) review of the proposal; (6) the award process; (7) reimbursement policies and procedures, including eligible costs, ineligible costs, reimbursement documentation, and ownership of federally funded equipment; (8) project revisions; (9) copyrights; (10) property and services procurement; (11) reports, including interim and final reports; (12) provision of information; (13) single audit requirements and costs; and (14) records retention. Descriptions of the following grant funding areas are attached: basic library technology; community information network; Internet training center; advanced technology research and demonstration; improving library and information services to persons having difficulty using a library; improving library and information services to the underserved; libraries for the blind and physically handicapped; and regions of cooperation. (MES)

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ED 475 295

Library of Michigan

FY 2000 LSTA Subgrant Program

Guidelines

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I. OVERVIEW

This subgrant program was developed by the Library of Michigan to distribute federal library funding received under the Library Services and Technology Act (LSTA). This federal program has two broad purposes:

to encourage library technology and networking among all types of libraries; and
to provide assistance to those having difficulty in using libraries.

Goals for the improvement of library service, as well as the specific programs and services to be funded have been identified in the ***Library Services and Technology Act Five Year State Plan for Michigan October 1, 1997 - September 30, 2002***, published by the Library of Michigan. The state plan is implemented through annual LSTA programs, services, and subgrants.

This publication includes a summary of the FY 2000 funding areas and a guide to the overall state plan for LSTA implementation. Examples of activities eligible for support in each funding area, the eligibility requirements for applicants, and the criteria to be used in evaluating project proposals are also described.

The **LSTA Funding Areas for FY 2000** may be classified into three groups:

1) **Statewide projects**
2) **Competitive subgrant projects**
3) **Subgrant projects dedicated to a specific area of statewide interest**

Statewide projects may include federal funding for:

- The statewide electronic database project to license both full-text and indexes for use by Michigan libraries (AccessMichigan);
- The provision of Internet access to a statewide listing of periodical and newspaper titles and holdings (SPAN: Serials, Periodicals and Newspapers);
- Support for the Michigan Electronic Library (MEL);
- The expenses for the evaluation of the results of the projects and services that have been funded; and
- The provision of telephone access to selected Michigan and national newspapers through pilot projects for persons with disabilities.

Competitive subgrant projects may include funding for:

- The addition of basic library technology in underserved areas where this technology has not been available in the past;
- Community information network development;
- Adaptive library technology, for serving persons with disabilities;
- Outreach services to individuals with difficulty in using a library;
- Projects that serve children from families with incomes below the poverty line;
- Funding may also be provided to bring leading edge technology to Michigan libraries, through research and demonstration projects that provide assistance to libraries of all types; and
- Projects to enhance Internet training centers.

Subgrant projects dedicated to a specific area of statewide interest may include:

- Specific subgrants to assist the development of libraries serving the blind and physically handicapped; and
- Support for the activities of the multitype Regions of Cooperation.

The **LSTA Five Year State Plan for Michigan** will be reviewed and updated to make appropriate adjustments as further federal guidance becomes available and as the results of LSTA-funded subgrants are known. Suggestions for improvements in the LSTA program and guidelines may be sent to the Library of Michigan at any time.

To subscribe to the LSTA listserv, send the message "subscribe lsta" to majordomo@listserv.libofmich.lib.mi.us.

II. GENERAL GUIDELINES - Apply to **ALL** subgrant funding areas

A. Applications for competitive subgrants must be received at the Library of Michigan by the due date listed on the application, regardless of delivery method. **No extension of proposal due dates will be made.**

B. For competitive subgrant projects, federal funds are to be used as seed money and are not to be used to replace local funding of daily operations, including materials or staff, or used to support ongoing activities.

C. According to LSTA, Section 213, the term 'library' includes:
   1) a public library;
   2) a public elementary school or secondary school library;
   3) an academic library;
   4) a research library that:
      a) makes publicly available library services and materials suitable for scholarly research and not otherwise available to the public; and
      b) is not an integral part of an institution of higher education; and
   5) a private library, but only if the state in which such private library is located determines that the library should be considered a library for purposes of this subtitle.

   NOTE: Charter school libraries are eligible within the public school category, if the charter school has been approved by the State of Michigan.

D. To be eligible to apply for LSTA funds, the library must meet **all** of the following Library of Michigan criteria:
   1) have one or more paid library staff;
   2) have a regular schedule of library service;
   3) have a dedicated facility for library purposes;
   4) have an annual budget with funds reserved for library materials and services; and
   5) have a record of multitype library cooperation, evidenced by activities such as union listing of holdings, reciprocal borrowing or interlibrary loan.

In addition, Library Cooperatives established under P.A. 89 of 1977, Regions of Cooperation (ROCs), Regional Educational Media Centers (REMCs), and Intermediate School Districts (ISD) may apply on behalf of their members for a centrally-administered project that will benefit multiple library locations.

E. A multi-branch library or school district may choose to apply on behalf of an individual branch, selected branches, or the system as a whole.

F. A library may apply in more than one funding area and may submit more than one application within a funding area.

G. Each proposal must clearly designate only one funding area.

H. The amount requested may range from $5,000 to $150,000 depending on the funding area. The total amount requested must be within the range established for the funding area.

I. Projects must clearly document the expected benefit to individuals. Applicants may propose a project to serve a specific group, such as senior citizens, based on need. Projects which focus broadly on benefits to the general business community, government, or other groups are ineligible.

J. Collaborations among libraries and with community agencies which benefit individuals in the community are strongly encouraged. The subgrant proposal must clearly designate a single eligible applicant and the subgrant administrator must be an employee of the applicant.

K. Each subgrant proposal must be independent of any other LSTA proposal.

L. All LSTA project activities must occur within the award period identified in the subgrant contract document.

Project costs and obligations incurred prior to or beyond the award period will not be reimbursed.

M. All subgrant funds are disbursed on a reimbursement basis. The due date for reimbursement documentation will be identified in the subgrant contract document. Subgrant reimbursement requests may be sent in at any time in the subgrant period prior to that date.

N. During the proposal review process, applicants who have received past LSTA subgrants will be evaluated on their history of administering those projects. Specifically, an applicant library that has not completed all activities as approved in a previous LSTA subgrant project without sufficient explanation, or that has failed to complete a satisfactory LSTA final report at the close of the subgrant, will be rated as "ineligible" to apply for LSTA funding in subsequent years. The subgrant recipient will be returned to "eligible" status after a waiting period of 12 months from the date on which the subgrant was accepted by the Library of Michigan as satisfactorily completed.

O. Legislators will be notified of subgrant awards to libraries located in their districts prior to notification to applicants.

P. Libraries may not charge patrons for the use of materials or equipment acquired with LSTA funds during the subgrant period. After the close of the subgrant, fees are a local policy matter.

Q. Locations for all LSTA funded items must be clearly specified in the application.

R. Each subgrant proposal must:
1) include one original and five copies;
2) be submitted as single-sided documents;
3) have consecutive page numbers;
4) be typed or computer generated; and
5) be submitted in typewriter font size not more than ten characters per inch and computer font size not less than twelve point.

S. All proposals (copies and originals) become the property of the Library of Michigan and cannot be returned.

III. REQUIRED ELEMENTS OF THE APPLICATION

A. **Funding Area:** Proposal must clearly designate one funding area.

B. **Project Administration:** Includes information about the fiscal agency, fiscal year end, fiscal agent, subgrant administrator, library director, and project administrator. See Glossary, Appendix A, for definition of terms. Use the Change in Key Personnel form, Appendix D, to report key personnel changes during the life of a project.

C. **Abstract:** The abstract presents in summary form the major components of the proposal, including the target audience's need for the project; project goal and description; project activities; and the estimated number of persons to be served by the project. The abstract must be fully contained in the space provided on the application form.

D. **Narrative:** See the specific funding area in this booklet for elements that must be included in the narrative section of the proposal.

E. **Project Objective(s):** Describe the objective(s) of the project. Include as many objectives as you wish. Use a separate page for each objective. Each objective should be measurable and specific.

F. **Project Activities:** Describe the activities which will achieve the stated objective and how they will be implemented. For example, identify types of programs to be provided or library materials to be purchased, and how they will be selected and ordered. Include a description of all activities listed in the project budget.

G. **Objective Budget:**
   1) Use only the budget categories defined in Section IV of the LSTA Subgrant Guidelines;
   2) Identify the budget category used;
   3) Provide supporting calculations;
   4) Report the amount requested for each budget category and the total for the project objective; and
   5) Each expenditure must relate to a project activity.

H. **Summary Budget:** Total all project objective budgets, arranged by budget categories. The total of the summary budget must equal the total amount requested for the project.

I. **Timeline:** Include a step-by-step chronological list of all project activities. Project timeline should include steps in the evaluation.

J. **Evaluation:** Project evaluation is a required activity, critical to assessing the impact of a project. The evaluation plan must include:

   1) a description of what is to be measured;
   2) data collection methodology;
   3) target benchmarks used to determine success; and
   4) a plan to share evaluation results.

K. **Participating agencies and service populations:** List all agencies actively collaborating in the project and their service populations.

L. **Board Resolution Statement of Assurances:** Complete the form to certify that:

   1) The applicant has the legal authority to apply for federal funding;
   2) The applicant will comply with federal regulations and LSTA Subgrant Guidelines;
   3) LSTA funds will be used to supplement and not supplant local funding for library service purposes; and
   4) All information presented in the LSTA application is truthful. This form also includes required certifications regarding debarment and lobbying.

IV. BUDGET CATEGORY DEFINITIONS

Use only the budget categories listed. The definitions are meant to clarify the budget categories and are not meant to limit the items in each category only to those mentioned. See Section VII, Reimbursement Policies and Procedures, of the LSTA Subgrant Guidelines for procedures to be followed and documentation to be provided.

LSTA Budget Categories:

A. Communications
B. Library Materials and Supplies
C. Professional Services and Costs

D. Promotion and Outreach
E. Technology
F. Training
G. Miscellaneous

Budget Category Definition:

A. Communications: Telephone billings, telecommunication charges, and other communications expenses.

B. Library Materials and Supplies: Materials and supplies necessary to carry out the subgrant project. Includes library materials such as books, catalog cards, CD-ROMs, films, microfiche, microfilm, microform materials, periodicals, videos; and office items such as copy paper, letterhead, and postage. Subscriptions for no more than 12 months may extend beyond the subgrant period if ordered and paid for before the expenditure deadline.

C. Professional Services and Costs: (not related to outreach, promotion, technology or training)

Includes consultant fees, professional fees, and staff costs, other than those specifically related to another budget category. Includes travel, meals, and lodging when expended in direct support of project objectives not related to outreach, promotion, technology or training. Activities related to promotion and outreach, technology, or training should be designated in those budget categories.

D. Promotion and Outreach: All costs related to promotion of the project and outreach, including advertising, design fees, printing, publishing, and travel costs. Includes costs of promotional items to make the target population aware of the improved library service.

E. Technology: Costs of technology including hardware, software, supplies, and furnishings integral to the project. Also includes the costs for consultant fees, delivery, installation, and maintenance of hardware, software, and other technology related expenses. Maintenance contracts for no more than 12 months may extend beyond the subgrant period, if ordered and paid for before the expenditure deadline.

F. Training: Includes project related training costs such as wages, professional fees, administrative costs, preparation and printing of training materials and supplies. Includes travel, meals, and lodging when expended in direct support of project's training objectives.

G. Miscellaneous: Unusual or hard to classify items. Provide specific details for any expenditures listed in this category.

V. REVIEW OF PROPOSAL

Each application will be reviewed by a team of Library of Michigan staff members, and may also include representatives from the LSTA Advisory Council or Library of Michigan Board of Trustees. The State Librarian will make all final decisions on subgrant awards.

During the proposal review process, applicants who have received past LSTA subgrants will be evaluated on their history of administering those projects.

VI. AWARD LETTER AND SUBGRANT CONTRACT

A. **Award Letter:** Receipt of the LSTA award letter from the State Librarian authorizes the start of the LSTA project. All invoices and obligations must be incurred within the award period stated in the subgrant contract document. Expenditures or contractual obligations incurred prior to the start of the award period will not be eligible for reimbursement under the LSTA program.

B. **Subgrant Contract:** The Library of Michigan will prepare and execute a contract with each subgrantee and fiscal agency.

VII. REIMBURSEMENT POLICIES AND PROCEDURES

Subgrantees must follow all Library of Michigan guidelines and federal regulations in order to continue participation in the LSTA subgrant program.

A. **Eligible Costs:** Funds must be expended solely for the purposes described in the approved subgrant project proposal or approved project revision. When items are purchased that are not specifically mentioned in the subgrant proposal, the subgrantee runs the risk of covering those expenditures with local funds. The Library of Michigan retains the right to deny reimbursement for items that are not described sufficiently in the subgrant proposal, or to approve such expenditures after proper authorization has been obtained.

Funds are available to subgrantees only on a reimbursement basis. All project expenditures and obligations must be incurred after the award date and prior to the expenditure deadline, unless a project extension has been approved. The award period is stated in the contract between the Library of Michigan and the subgrantee.

The Library of Michigan will reimburse the subgrantee only when:

1. The subgrantee has paid for the goods and/or services; and
2. The subgrantee has received the goods and/or services.

Printed Items: When materials are printed and those costs are claimed as part of the subgrant, include a complete copy of the item produced with your Reimbursement Requests. The following statement must be included on all publicity, printed or promotional materials funded by or about the LSTA project:

"Funded, in part, with a federal Library Services and Technology Act subgrant, administered by the Library of Michigan."

Professional Services: Subgrantees may contract for services from individual libraries, library cooperatives, or other entities. Rules regarding reimbursement vary depending upon the type of service provider. In most cases, a contract is not required for professional services to be provided by unrelated entities. Documentation submitted for reimbursement must be on an invoice, on the letterhead of the service provider, or on the LSTA Record of Professional and Contractual Services form. It must include charges for services only after they have been provided.

For professional services performed by an individual not on the library's payroll, an invoice, signed and dated billing on the professional's letterhead, or the LSTA Record of Professional and Contractual Services form is required for reimbursement.

Professional services to be provided by another library or library cooperative must be documented by a contract that reflects an arms-length transaction. The contract must contain the dates when the services will be performed, and a description of the services and charges for the services. Invoices submitted for reimbursement must be on the letterhead of the service provider and include charges for services only after they have been provided.

Contracts over $2,000 that include services performed by laborers or mechanical workers (i.e. carpentry, alteration, electrical, or painting) are covered by the Davis Bacon Act as well as other related acts and at a minimum, require payment of the federally established prevailing wages and fringe benefits. If you suspect that your project involves this type of contractual situation, contact the Library of Michigan for further information before signing any contracts.

Travel Reimbursements: Travel costs may only be incurred when they are in direct support of project objectives. Mileage requests require a beginning and ending destination, as well as the purpose of the travel. Meals and lodging must be supported by dated receipts.

Travel costs for subgrantee staff are limited to the State rates in effect at the time the expense is incurred. Reimbursements must be documented on LSTA Travel Reimbursement forms. Out-of-state travel for staff is not authorized for reimbursement in LSTA projects. Maximum rates in effect at the time of publication are as follows:

Lodging (actual, supported by receipts)	$60.00 + taxes
Breakfast	6.00
Lunch	7.25
Dinner	15.75
Mileage rate - private car	$.3175/mile

B. **Ineligible Costs:**

The following items are **among** those **not eligible** for reimbursement:

1. Food and beverages provided at workshops, meetings, or open houses
2. Fringe benefits
3. Payroll taxes
4. Photocopiers
5. Sales taxes
6. Transportation equipment
7. Overhead and indirect costs

C. **Reimbursement Documentation:**

1. **LSTA Reimbursement Request - Required Form** - must be signed by the subgrant administrator and the fiscal agent. Only original signatures will be accepted. Use the Change of Key Personnel form, Appendix D, to notify the Library of Michigan should either of these individuals change during the life of the project.

   All completed Reimbursement Requests (RR), including all attachments, must be received by the Library of Michigan no later than the stated due date, unless a project extension has been approved by the Library of Michigan. If it is determined that information is missing from the RR during the Library of Michigan's review, the RR may be returned to the subgrantee in its entirety, along with a letter that identifies what additional information is needed.

   When complete information is received with the RR, the Library of Michigan can authorize payment promptly. After receiving the LSTA reimbursement check from the Michigan Department of Treasury, the subgrantee should staple the check stub to their file copy of the RR. At the time of the subgrantee audit, this will help identify the source as federal funds.

2. **LSTA Invoice Summary - Required Form** - summarizes the project expenditures for which reimbursement is being requested.

3. **Source Documents - Required** - Legible copy of each vendor invoice which documents that the transaction occurred within the subgrant period will be necessary for reimbursement. Invoices must be dated and include the quantity and unit cost, and accurate descriptions of goods and/or services provided. Packing slips including the above information will be acceptable when the vendor does not provide an invoice.

4. **LSTA Timekeeping Report Form** is required for individuals who are carried on the library's regular payroll. Fringe benefits and overtime rates paid by the subgrantee are not eligible for reimbursement.

LSTA Timekeeping Reports must be used for staff wages when:

1) the employee is on the library's payroll;
2) the functions supplement, not supplant, activities normally carried out by the library;
3) the wage is appropriate and reasonable for the LSTA activity; and
4) the functions are allowed under the LSTA program guidelines.

The Library of Michigan LSTA Timekeeping Report form must be used for every LSTA-funded employee for each weekly work period to claim reimbursement for wages. Only staff hours actually funded by the LSTA award should be recorded on the timekeeping form. The hours worked for the weekly periods must be multiplied by the pay rate and recorded in the lower right hand section of the timekeeping report. The number of hours recorded on the time sheets must tally with the number of hours for which reimbursement is requested. The employee and the supervisor must sign and date all time sheet submitted to the Library of Michigan for reimbursement.

5. **LSTA Equipment Inventory Form** documents all tangible, non-expendable personal property having a useful life of more than one year and an acquisition per unit cost of $5,000 or more.

Information to be completed on the Equipment Inventory form includes:

a) A description of the equipment, including the manufacturer's model and serial number.
b) Acquisition cost is the net invoice price of the equipment, including the cost of installation, transportation, testing and similar preparatory costs, modifications, attachments, accessories, or auxiliary apparatus necessary to make the equipment usable for the purpose for which it was acquired.
c) Vendor from whom the equipment was purchased.
d) Date equipment was received by the library.
e) Location of the equipment in the library.
f) Percentage of acquisition cost paid by LSTA funds.
g) Report whether the equipment purchased is actually being used by the library patrons and/or personnel.
h) Any final data such as information on the transfer or disposition of equipment. List the date, sale price, or method used to determine fair market value, where applicable.

Equipment purchased with subgrant funds is subject to certain federal regulations (45 CFR 1183.32) and state guidelines and should be identified with a faceplate to be provided by the Library of Michigan.

A separate equipment inventory form must be maintained for each LSTA subgrant project and submitted to the Library of Michigan with the Reimbursement Requests for the inventoried items.

D. **Ownership of Federally Funded Equipment**

Title to equipment acquired under an LSTA subgrant vests upon acquisition in the subgrantee. Equipment shall be used by the subgrantee in the program or project for which it was acquired as long as needed, whether or not the project or program continues to be supported by federal funds. When no longer needed for the original program or project, the equipment may be used in other activities currently or previously supported with federal funds, regardless of purchase cost or current value.

Procedures for managing equipment must, at a minimum, meet the following requirements:

1. Property records must be maintained, and include a description of the property, a serial number or other identification number, the source of property, title holder, the acquisition date, the cost of the property, percentage of federal participation in the cost of the property, the location, use and condition of the property, and any ultimate disposition data including the date of disposal and sale price of the property.

2. A physical inventory of the property must be taken and the results reconciled with the property records at least once every two years. A copy of the inventory must be submitted to the Library of Michigan.

3. A control system must be developed to ensure adequate safeguards to prevent loss, damage, or theft of the property. Any loss, damage, or theft shall be investigated.

4. Adequate maintenance procedures must be developed to keep the property in good condition.

5. Proper sales procedures must be established to ensure the highest possible return if the grant recipient is authorized or required to sell the property. Subgrant recipients assume any expenses incurred from selling LSTA funded equipment. There is no provision for using any of the sale proceeds to cover expenses.

Disposition is an action which reduces a subgrantee's control of LSTA funded equipment. Disposition includes, but is not limited to: selling, loaning, exchanging, trading in, transferring, donating, destroying, or using the equipment for purposes other than supporting the authorized LSTA project.

When acquiring replacement equipment, the subgrantee may use the equipment to be replaced as a trade-in, or sell the property and use the proceeds to offset the cost of the replacement property, subject to prior approval by the Library of Michigan.

Fair market value is the estimated amount (appraisal value) which could be received for an asset in a transaction with a neutral party in an open market at a point in time. It is the price for which the asset could be sold in an arms-length transaction between unrelated parties.

Fair market value of $5,000 or more: The subgrantee may retain or sell the equipment and the federal government shall have a right to an amount calculated by multiplying the current market value or proceeds from the sale by the federal government's share of the equipment. This amount is payable to the Library of Michigan as the administrative agency for the LSTA subgrant. All disposition of such equipment must have prior written approval from the Library of Michigan.

Fair market value of less than $5,000: The subgrantee may retain, sell, or otherwise dispose of the equipment with no further financial obligation to the federal government. Notice of such disposition must be reported to the Library of Michigan.

VIII. PROJECT REVISIONS

A. Variations that require a Project Revision:

1) **Objective/Activity Revisions** occur when an objective will not be accomplished as approved, or when a subgrantee wants to change an activity that was approved, or carry out an activity not included in the approved project proposal or previously approved revision. Most revisions of this nature will also include fiscal changes in the objective and summary project budgets.

2) **Major Budgetary Revisions** occur when a single change, or the cumulative total of a number of changes, exceeds ten percent of the amount of the subgrant award. Changes of this magnitude, although driven by budget adjustments or price changes, are seen as possibly affecting the ability of the subgrantee to carry out the project as originally approved.

B. Variations that do not require a Project Revision:

A project revision is not required if single or cumulative adjustments to previously approved activities are ten percent or less of the subgrant award, and the overall scope and specific objectives of the project do not change.

C. Procedure to request a Project Revision:

To request approval, the subgrantee must submit a Project Revision form. It is strongly recommended that all Project Revision forms be filed prior to the end of the eighth month of the subgrant expenditure period. It is also strongly recommended that the subgrantee obtain prior written approval from the Library of Michigan before carrying out a project revision. If the subgrantee

carries out the project revision before receiving approval from the Library of Michigan, the subgrantee runs the risk of covering those expenditures with local funds.

A cover letter explaining the proposed revision and justification should be inciuded with the Project Revision form. Attach the following documentation to the cover letter:

- A revised Abstract that reflects the adjustments to the project;
- Revised sections of the project Narrative, when applicable;
- All Project Objectives, Activities, and Budgets that change because of the revision; and
- A revised Summary Budget.

The same guidelines that were applicable at the time of the subgrant application continue to apply when project revisions are made.

D. Incomplete projects without approved Project Revision:

All subrant projects must be completed as described in the original project proposal and any approved project revisions.

If a subgrant recipient reaches the end of an LSTA project without acting on one or more of the approved activities, and no project revision or explanation for the incomplete project has been provided to the satisfaction of the Library of Michigan, the subgrant recipient will be ruled "ineligible" to apply for LSTA funds in the future. The subgrant recipient will be returned to "eligible" status after a waiting period of 12 months from the date on which the subgrant was accepted by the Library of Michigan as satisfactorily completed.

IX. COPYRIGHTS

The federal awarding agency reserves a royalty-free, nonexclusive, and irrevocable license to reproduce, publish, or otherwise use for federal government purposes, the copyright in any work developed under the subgrant or contract under the subgrant, or purchased with subgrant support (45 CFR 1183.34).

X. PROPERTY AND SERVICES PROCUREMENT

All goods and services purchased with federal funds must conform to applicable federal laws and standards (45 CFR 1183.36).

All procurement transactions must be conducted in a manner providing for full and open competition. Procurement by small purchase is a relatively simple and informal method of procurement for securing services, supplies, or property that do not cost more than $100,000 in the aggregate. If small purchase procurement is used, price and rate quotations should be obtained from an adequate number of qualified sources.

The subgrantee must retain sufficient records to detail the procurement method used. These records should include, but are not limited to, the following: rationale for the

method of procurement, selection of contract type, contractor selection or rejection, and basis for the contract price.

XI. REPORTS

A. **Interim Reports:**
During the grant year, the Library of Michigan will send forms for reporting project progress to subgrantees. These reports request information pertinent to project expenditures, as well as progress on project objectives. This information is required for federal and state reporting and must be submitted in a timely fashion.

B. **Final Reports:**
The Library of Michigan will send forms for final narrative and evaluation reports to all subgrantees. The subgrantee's narrative report must include achievements, successes/failures, and the impact of the project on the individuals and communities the library serves. Data supporting the evaluation must be included. Final reports must include statistics on the number of people served by the project.

Failure to submit a final narrative report will result in disqualification for future subgrant awards. The subgrant recipient will be returned to "eligible" status after a waiting period of 12 months from the date on which the subgrant was accepted by the Library of Michigan as satisfactorily completed.

A Final Expenditure Report will be sent to each subgrantee after the final payment has been made by the Library of Michigan. This report confirms the total amount expended on the subgrantee's project.

LSTA site visits may be conducted by the Library of Michigan on a random basis. A site visit report will be completed by the Library of Michigan representative.

XII. PROVISION OF INFORMATION

If the library director fails to respond to a request for information, the Library of Michigan may contact the Board Chair or other authorized official to obtain needed information or to prevent the lapse of federal funds.

XIII. SINGLE AUDIT REQUIREMENTS AND COSTS

Audit requirements for recipients of federal aid are established according to: Single Audit Act of 1984, Public Law 98-502; Single Audit Act Amendments of 1996, Public Law 104-156; in accordance with Office of Management and Budget (OMB) Circular A-133, Audits of States, Local Governments, and Non-Profit Organizations.

Michigan public libraries are often included in the Single Audit of their units of local government conducted under the state Uniform Budgeting and Accounting Act. In addition to its normal distribution, the subgrantee should distribute their audit report and financial statements to the Library of Michigan, Attn: Federal Programs Team, when LSTA funds expended equal or exceed $300,000 in a fiscal year.

Any library or fiscal agency which is not included in a Single Audit of a local government unit under the Uniform Budgeting and Accounting Act shall contract with an independent auditor to conduct a Single Audit, in accordance with OMB Circular A-133, when the subgrantee expends $300,000 or more of federal funds in the subgrantee's fiscal year.

Auditors should be informed that payments received from LSTA subgrant awards are 100 percent federal funds under Catalog of Federal Domestic Assistance (CFDA) 45.310, and subject to the Single Audit Act. All auditors shall comply with the Government Auditing Standards when performing these audits.

When a Single Audit is required because of LSTA funds expended, a copy of the prearranged audit contract (audit engagement letter) between the subgrantee and either the Michigan Department of Treasury or an independent CPA firm must be filed with the Library of Michigan before the final ten percent of an LSTA award can be released. This contract must show when the Single Audit will be performed and the projected completion date. A Library of Michigan Single Audit Checklist will be enclosed with the award package. This checklist can be used in place of the audit engagement letter. The subgrantee should submit the Single Audit report to the Library of Michigan as soon as the audit is completed.

Single Audit costs are allowable charges to LSTA subgrants only when a Single Audit is required due to LSTA funds expended. Single Audit costs must be included in the approved grant proposal, if reimbursement will be requested.

The allowable amount of reimbursement for Single Audit charges may be calculated as a percentage of the total Single Audit expense. This expense should not exceed the percentage of LSTA funds in relation to the fiscal agency's total federal funds audited. The percentage can be different if cost documentation demonstrates higher or lower actual Single Audit costs for the LSTA funded projects.

If all other documentation is received, projects will be preliminarily closed out by the Library of Michigan prior to completion of the Single Audit report. Approved Single Audit charges will be reimbursed after submission of the completed Single Audit. To obtain reimbursement of Single Audit fees, use the LSTA RR form, supported by a copy of the audit bill with the date paid and check number noted.

The Library of Michigan is responsible for ensuring compliance with federal requirements at both the state and subgrantee levels. This responsibility includes operating the LSTA program, assuring audit resolution, and maintaining property records.

If there are audit findings, the subgrantee is required to develop and implement a corrective action plan that addresses the findings and recommendations resulting from its A-133 audit. The Library of Michigan reviews each subgrantee's Single Audit report and requires that a Single Audit follow-up be sent to the Library of Michigan for inclusion in the subgrantee's file.

Failure to respond to a Library of Michigan request for audit review follow-up or failure to comply with Single Audit requirements will preclude further participation in the LSTA program.

XIV. RECORDS RETENTION

All records for each project must be maintained separately from those of other projects. Accounting records should be supported by source documentation such as canceled checks, paid invoices, and payrolls.

Records must be retained for three years after the date of the final expenditure report. In cases of audit questions, records must be maintained until resolution or three years after the date of the final expenditure report, whichever is later.

Library of Michigan

FY 2000 LSTA Subgrant Program

Funding Areas

Funding Area:	**Basic Library Technology**
Range of Subgrant Awards:	$5,000 - $25,000 per participating site

Eligibility:

1. All types of libraries are eligible.
2. An established history of resource sharing and cooperation with other types of libraries is required.
3. Technology requested must be new to the applicant library.

Library of Michigan LSTA Program Goal II:

Increase equity of information access by providing special assistance to areas of the state where services are inadequate (underserved rural and urban communities), and to libraries that are working to provide service to persons having difficulty using a library.

The Library of Michigan will assist libraries, in areas of the state where library services are inadequate, to add the entry level information technology needed by the applicant library. In a networked society, it is necessary for all types of libraries to provide at least a basic level of access to electronic resources. Technology is needed to access resources in other Michigan libraries and to link libraries electronically to educational, social or informational resources. Technology is also necessary to enable the library to provide public access and training.

Activities: Subgrants will be awarded for the purchase of computers, equipment, software, and telecommunication costs to provide Internet access and link libraries electronically; creation of local or wide area networks; the initial installation of an automated circulation system or online public access catalog; and technology training.

Costs for record conversion are allowable only in conjunction with the introduction of a library automation system. These costs should be met in-part with local funds or in-kind support, since updating costs will be an ongoing expense beyond the life of the LSTA subgrant.

The Narrative Portion of Subgrant Proposal Should:

- ❑ Describe how the applicant library meets the eligibility requirements as adopted by the Library of Michigan. (See General Guidelines)
- ❑ Describe the relationship of the project to Library of Michigan LSTA Program Goal II.
- ❑ Describe the financial needs of the library.

- ❑ Describe the technology needs of the library. Include a description of the current technology and the longer term technology plan for the library.
- ❑ Describe the established history of resource sharing and cooperation with other libraries.
- ❑ Relate the proposed project to the library networking plan of the Cooperative, Region of Cooperation, or other resource sharing organizations in the area.
- ❑ Describe the unmet library needs of the target population. Provide statistical data and demographic information to support need. Cite sources of all data used.
- ❑ Explain the local resources that will be used to assist with the project, such as funding or technical support.
- ❑ Describe the plans to continue the project beyond the grant period. Include plans for funding and use of project evaluation in support of future funding.
- ❑ Describe how the target population will be made aware of the improved library service.

REMINDER —

- ✔ Review general guidelines in detail;
- ✔ Use only the application forms provided (reproduce if necessary); and
- ✔ Review your application to be sure the following items are addressed:
  - Project Administration
  - Abstract
  - Narrative
  - Objective(s)
  - Project Activities
  - Objective Budget(s)
  - Summary Budget
  - Timeline
  - Evaluation
  - Participating Agencies
  - Board Resolution Statement of Assurances

Funding Area:	**Community Information Network**
Range of Subgrant Awards:	$10,000 - $50,000

Eligibility:

1. All types of libraries that provide information to the general public are eligible.
2. An established history of resource sharing and cooperation with other types of libraries and with community agencies is required.

Library of Michigan LSTA Program Goal II:

Increase equity of information access by providing special assistance to areas of the state where services are inadequate (underserved rural and urban communities), and to libraries that are working to provide service to persons having difficulty using a library.

The Library of Michigan will assist libraries to improve and extend services to the residents of the community through the use of information technology. Community Information Networks serve to link libraries to the state and national community, and to provide improved citizen access to the wide range of unique local information needed in daily life. The library has a unique role in collecting, organizing, and presenting local information derived from a strong working relationship with the private, non-profit and governmental agencies serving that community. The library may also provide a point of public access to the community information network, as well as training in the use of these resources.

Activities: Subgrants will be awarded for the purchase of computers, equipment, software, telecommunication, and other direct costs of establishing or enhancing a Community Information Network that is available to all residents of the community. Costs for scanning or entering local information should be met, in part, with local funds or in-kind support since the upkeep of the local data will be an ongoing part of the service beyond the life of the LSTA subgrant.

NOTE: The **Community Information Toolkit** project, funded by Ameritech through the Library of Michigan Foundation, is expected to provide the basic software, sample procedures and instructions needed to initiate community information services. Applicants are expected to make appropriate use of the Toolkit and should not duplicate the costs to LSTA funds.

The Narrative Portion of Subgrant Proposal Should:

- ❑ Describe how the applicant library meets the eligibility requirements as adopted by the Library of Michigan. (See General Guidelines)

- ❑ Describe the relationship of the project to Library of Michigan LSTA Program Goal II.
- ❑ Describe the financial needs of the library.
- ❑ Describe the current technology and the longer term technology plan for the library.
- ❑ Describe the degree to which the Ameritech Community Information Toolkit will be used.
- ❑ Describe the established history of resource sharing and cooperation with other libraries.
- ❑ Relate the proposed project to the library networking plan of the Cooperative, Region of Cooperation, or other resource sharing organizations in the area.
- ❑ Describe the unmet library needs of the target population. Provide statistical data and demographic information to support need. Cite sources of all data used.
- ❑ Explain the local resources that will be used to assist with the project, such as funding or technical support.
- ❑ Describe the plans to continue the project beyond the grant period. Include plans for funding and use of project evaluation in support of future funding.
- ❑ Describe how the target population will be made aware of the improved library service.

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Funding Area: **Inter net T raining Center**

Range of Subgrant Awards: $10,000 - $50,000

Eligibility:

1. All types of libraries and library networks providing Internet training services to the public are eligible.
2. An established history of resource sharing and cooperation with other types of libraries or community agencies is required.

Library of Michigan LSTA Program Goal II:

To support the continued development of information skills through continuing education on a collaborative basis statewide.

LSTA funding will continue to expand and strengthen Internet training centers in libraries and Cooperatives. In the library profession, the incorporation of new technologies into library services is changing the way libraries access and maintain information. Training centers play a critical role for developing skills and ongoing continuing education for library staff and the public, preparing them for these changes. Additionally, Michigan libraries play a vital role in developing critical information skills in their users and are identified as electronic information centers through the classes offered in Internet training centers. Through training centers, library service is improved with a direct benefit to the end users.

Activities: Subgrants will be awarded for the purchase of equipment including computer hardware and software upgrades, telecommunication costs to upgrade Internet access and related network equipment, and costs to enhance training center staff skills and supporting materials. Requests to fund day-to-day operational expenses and staff to conduct training will not be funded.

The Narrative Portion of Subgrant Proposal Should:

- ❑ Describe how the applicant library meets the eligibility requirements as adopted by the Library of Michigan. (See General Guidelines)
- ❑ Describe the relationship of the project to Library of Michigan LSTA Program Goal III.
- ❑ Describe the financial needs of the library or library network responsible for the Internet training center.
- ❑ Describe the technology training needs of the library or library network. Include a description of the current technology and longer term technology plan. Include a description of the plan for the Internet training to be provided, and describe the audience for the training.

- ❑ Describe the established history of resource sharing and cooperation with other libraries.
- ❑ Relate the proposed project to the library networking plan of the Cooperative, Region of Cooperation, or other resource sharing organizations including specific information on multitype library participation in the area.
- ❑ Describe the unmet library needs of the target population. Provide statistical data and demographic information to support need. Cite sources of all data used.
- ❑ Explain the local resources that will be used to assist with the project, such as funding or technical support.
- ❑ Describe the plans to continue the project beyond the grant period. Include plans for funding and use of project evaluation in support of future funding.
- ❑ Describe how the target population will be made aware of the improved library service.

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  - Project Activities
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  - Evaluation
  - Participating Agencies
  - Board Resolution Statement of Assurances

Funding Area: Advanced Technology: Research and Demonstration

Range of Subgrant Awards: $50,000 - $150,000

Eligibility:

1. All types of libraries are eligible.
2. An established history of resource sharing and cooperation with other types of libraries or community agencies is required.
3. Technology requested must provide significant benefits to libraries and library users.

Library of Michigan LSTA Program Goal IV:

To foster innovation and technical improvements in information services by funding leading edge projects in libraries which will serve as models and training centers.

The Library Services and Technology Act included in its statement of purpose a goal of stimulating excellence and promoting access to learning and information resources in all types of libraries for individuals of all ages [20 USC 9101 Sec.212(2)], as well as the goal of promoting library services that provide all users access to information through state, regional, national and international electronic networks [20 USC 9101 Sec.212(3)] and also to promote linkages among and between libraries [20 USC 9101 Sec.212(4)].

While many libraries are still working to introduce current technology and to train their staff and the public in its effective use, there is also a need for Michigan libraries to be forward looking and to participate in research and demonstration projects to help to develop the next generation of information skills and technology. This funding area is intended to assist libraries and library networks in pioneering new applications of information technology, and in sharing their knowledge with other Michigan libraries.

Activities: Subgrants will be awarded to introduce new technologies and to pioneer new applications of information technology in Michigan libraries. Funding may also be used to support the costs of demonstration and project sharing activities.

The Narrative Portion of Subgrant Proposal Should:

- ❑ Describe how the applicant library meets the eligibility requirements as adopted by the Library of Michigan. (See General Guidelines)
- ❑ Describe the relationship of the project to Library of Michigan LSTA Program Goal IV.
- ❑ Describe the financial needs of the library.

- ❑ Describe the technology needs of the library. Include a description of the current technology and longer term technology plan.
- ❑ Describe the established history of resource sharing and cooperation with other libraries.
- ❑ Relate the proposed project to the library networking plan of the Cooperative, Region of Cooperation, or other resource sharing organizations including specific information on multitype library participation in the area.
- ❑ Describe the unmet library needs of the target population. Provide statistical data and demographic information to support need. Cite sources of all data used.
- ❑ Explain the local resources that will be used to assist with the project, such as funding or technical support.
- ❑ Describe the plans to continue the project beyond the grant period. Include plans for funding and use of project evaluation in support of future funding.
- ❑ Describe how the target population will be made aware of the improved library service.
- ❑ Describe how project results will be shared with the Michigan library community. Include plans to demonstrate the technology locally, regionally, and statewide.

REMINDER —

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  - Project Activities
  - Objective Budget(s)
  - Summary Budget
  - Evaluation
  - Participating Agencies
  - Board Resolution Statement of Assurances

Funding Area: **Improving library and information services to persons having difficulty using a library**

Range of Subgrant Awards: $5,000 - $25,000

Eligibility:

1. All types of libraries are eligible.
2. An established history of cooperation with other libraries or community agencies is required.
3. Technology or services provided with grant funds must be new to the applicant library.

Library of Michigan LSTA Program Goal II:

Increase equity of information access by providing special assistance to areas of the state where services are inadequate (underserved rural and urban communities), and to libraries that are working to provide service to persons having difficulty using a library.

LSTA includes specific language to authorize the use of these federal funds to improve the library and information services to persons having difficulty using a library. The overall goal is to encourage all types of libraries to provide the same quality and level of service to all, through the use of appropriate adaptive technology and remote electronic access, or through training and additional outreach activities. "Difficulty in using a library" may include visual, physical or auditory conditions, type or location of residence, or other factors that make it difficult for a person to use a library.

Activities: Subgrants will be awarded for the purchase of computers, equipment, related software, or adaptive technology to provide improved library access for individuals having difficulty using a library.

Activities may also include new programs and services to provide outreach to individuals having difficulty using a library. Staff and library materials expenses are limited to those directly connected to the project. Requests to fund general library operations will not be funded.

The Narrative Portion of Subgrant Proposal Should:

- ❑ Describe how the applicant library meets the eligibility requirements as adopted by the Library of Michigan. (See General Guidelines)
- ❑ Describe the relationship of the project to Library of Michigan LSTA Program Goal II.
- ❑ Describe the financial needs of the library.

- ❑ Describe the current level of library and information service provided to the target population.
- ❑ Describe the established history of cooperation with other libraries or community agencies.
- ❑ Relate the proposed project to the cooperative goals of the participating agencies, including specific information on multitype library participation in the area.
- ❑ Describe the unmet library needs of the target population. Provide statistical data and demographic information to support need. Cite sources of all data used.
- ❑ Explain the local resources that will be used to assist with the project, such as funding, outreach, or technical support.
- ❑ Describe the plans to continue the project beyond the grant period. Include plans for funding and use of project evaluation in support of future funding.
- ❑ Describe how the target population will be made aware of the improved library service.

REMINDER —

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Funding Area:	**Improving library and information services to underserved urban and rural communities, targeting services to children from ages 13-17 from families with incomes below the poverty line**
Range of Subgrant Awards:	$5,000 - $25,000

Eligibility:

1. All types of libraries are eligible.
2. An established history of cooperation with other libraries or community agencies is required.
3. Technology or services provided with grant funds must benefit children ages 13 - 17.

Library of Michigan LSTA Program Goal II:

Increase equity of information access by providing special assistance to areas of the state where services are inadequate (underserved rural and urban communities), and to libraries that are working to provide service to persons having difficulty using a library.

LSTA uses the definition of "families with incomes below the poverty line" provided by the U.S. Office of Management and Budget. It is revised annually in accordance with section 673(2) of the Community Services Block Grant Act [42 U.S.C. 9902(2)] applicable to a family of the size involved (see Appendix E).

Activities: Subgrants will be awarded for outreach, training programs, library materials, and equipment to provide improved library services to children from age 13 through age 17 from families with incomes below the poverty line. Staff and library materials expenses are limited to those directly connected to the project. Requests to fund general library operations will not be funded.

The Narrative Portion of the Subgrant Proposal Should:

- ❑ Describe how the applicant library meets the eligibility requirements as adopted by the Library of Michigan. (See General Guidelines)
- ❑ Describe the relationship of the project to Library of Michigan LSTA Program Goal II.
- ❑ Describe the financial needs of the library.
- ❑ Describe the current level of library service provided to the target population.
- ❑ Describe the established history of cooperation with other libraries or community agencies.

- ❑ Relate the proposed project to the cooperative goals of the participating agencies, including specific information on multitype library participation in the area.
- ❑ Describe the unmet library needs of the target population. Provide statistical data and demographic information to support need. Include data on the extent of poverty documented in the service area. Cite sources of all data used.
- ❑ Explain the local resources that will be used to assist with the project, such as funding or community resources committed in support of the project.
- ❑ Describe the plans to continue the project beyond the grant period. Include plans for funding and use of project evaluation in support of future funding.
- ❑ Describe how the target population will be made aware of the improved library service.

REMINDER —

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Funding Area:	**Libraries for the Blind and Physically Handicapped** (separate application form)
Range of Subgrant Awards:	The amount will be calculated as a base amount plus an additional amount based on the eligible population served.

Eligibility:

1. This is a non-competitive subgrant available only to Libraries for the Blind and Physically Handicapped.

Library of Michigan LSTA Program Goal II:

Increase equity of information access by providing special assistance to areas of the state where services are inadequate (underserved rural and urban communities), and to libraries that are working to provide service to persons having difficulty using a library.

Activities: Subgrants will be awarded to:

- Support daily and outreach activities by Regional and Subregional Libraries for the Blind and Physically Handicapped.
- Provide demonstration projects, as well as training and equipment subgrants to encourage the adoption of adaptive technology in libraries.
- Assist libraries in providing the same quality and level of service to all patrons.
- Develop means of providing LSTA support for the improvement of library services to individuals with all types of disabilities.
- Emphasize the public library as a self-education arena for persons with disabilities with the intent of increasing employability and preparing for the workplace.

Note: 1. Only staff costs directly related to the project may be included.

2. In all cases, LSTA funds will be used to encourage the improvement of services that will be supported with local funds as a fully integrated service of each library.

The Narrative Portion of Subgrant Proposal Should:

- ❑ Describe the relationship of the project to Library of Michigan LSTA Program Goal II.

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- ❑ Describe the financial needs of the library.
- ❑ Explain the local resources that will be used to assist with the project, such as funding or technical support.
- ❑ Describe the plans to continue the project beyond the grant period. Include plans for funding and use of project evaluation in support of future funding.
- ❑ Describe the technology needs of the library, if applicable. Include a description of the current technology and longer term technology plan.
- ❑ Describe the established history of resource sharing and cooperation with other libraries.
- ❑ Relate the proposed project to the library networking plan of the Cooperative, Region of Cooperation, or other resource sharing organizations including specific information on multitype library participation in the area.
- ❑ Describe the unmet library needs of the target population. Provide statistical data and demographic information to support need. Cite sources of all data used.
- ❑ Describe how the target population will be made aware of the improved library service.

REMINDER —

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Funding Area:	**Regions of Cooperation (ROCs)** (separate application form) (ROCs were established in 1980 to facilitate federal funding of shared projects among all types of libraries.)
Range of Subgrant Awards:	The amount will be calculated as a base amount plus an additional amount based on the eligible population served.

Eligibility:

1. This is a non-competitive subgrant available only to Regions of Cooperation.

Library of Michigan LSTA Program Goal II:

Increase equity of information access by providing special assistance to areas of the state where services are inadequate (underserved rural and urban communities), and to libraries that are working to provide service to persons having difficulty using a library.

Activities: Subgrants will be awarded to:

- Provide support for establishing or enhancing the electronic linkages among or between libraries, including local, regional and statewide networks.
- Projects which create or enhance partnerships with other libraries and/or agencies.
- Assist Michigan libraries to establish or participate in consortia for efficient sharing of resources and to lower costs.
- Assist efforts to create and continue regional cooperation among all types of libraries.

Note: 1. Only staff costs directly related to the project may be included.

2. In all cases, LSTA funds will be used to encourage the improvement of services that will be supported with local funds as a fully integrated service of each library.

The Narrative Portion of Subgrant Proposal Should:

- ❑ Describe the relationship of the project to Library of Michigan LSTA Program Goal II.
- ❑ Describe the financial needs of the ROC.

- ❑ Describe the technology needs of the participating ROC member libraries, if applicable. Include a description of the current technology and longer term technology plan.
- ❑ Describe the established history of resource sharing and cooperation with other libraries.
- ❑ Relate the proposed project to the library networking plan of the Cooperative, Region of Cooperation, or other resource sharing organizations including specific information on multitype library participation in the area.
- ❑ Describe the unmet library needs of the target population. Provide statistical data and demographic information to support need. Cite sources of all data used.
- ❑ Explain the local resources that will be used to assist with the project, such as funding or technical support.
- ❑ Describe the plans to continue the activities beyond the grant period. Include plans for funding and use of project evaluation in support of future funding.
- ❑ Describe how the target population will be made aware of the improved library service.

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Office of Educational Research and Improvement (OERI)
National Library of Education (NLE)
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